SAP Training

TM310
Leave Administration

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Notes

Welcome to the BEACON SAP *TM310 – Leave Administration* training.

Prerequisites

Prior to attending this course you should have taken the following prerequisites:

- BEACON Overview - BC100

- SAP Basic Navigation - BC110

- Time Overview – TM200

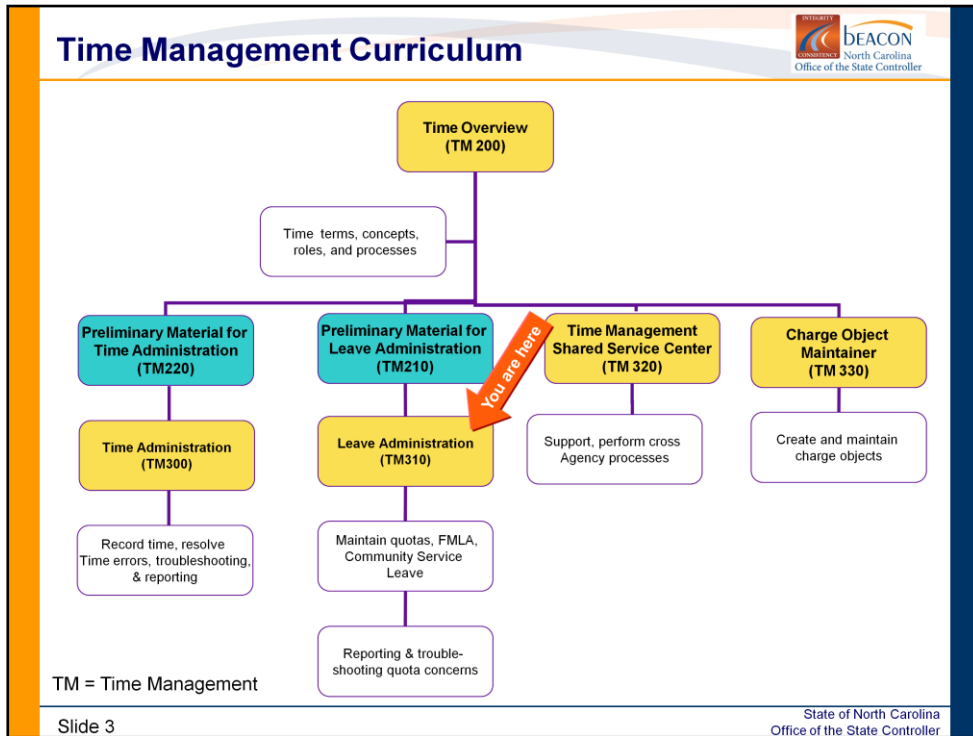- Introduction to Leave Administration - TM210

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Notes

There are four pre-requisites that you MUST take before attending this class. Attending these pre-requisites ensures that you are prepared to learn the new processes, concepts, terms, and data entry skills that are covered in this course.

TM310 – Leave Administration

Notes

As noted in the pre-requisites this class is preceded by the web based course *TM210 – Introduction to Leave Administration.*

SAP - Welcome

Welcome to the *Leave Administration* course.

- Introductions

- Sign the Training Attendance Sheet

- Classroom etiquette

- Cell phones off

- No side conversations

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Notes

The course introduction is an opportunity to get to know the others who are attending this class as well as agree on classroom courtesy. The instructor will inform you about the facilities and when the breaks will occur.

Please make sure you receive the credit you deserve for attending this class by signing the attendance sheet.

Welcome: Strategy for Training

- **Tell me**   **Concepts**
  Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

- **Show me**   **Demonstrations**
  Instructor will demonstrate job-related tasks performed in SAP – HANDS OFF

- **Let me**   **Exercises**
  Student will complete the exercises which allows for hands-on practice in class – HANDS ON

- **Support me**   **Availability**
  Instructor will be available to answer questions while the students complete the exercises

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Notes

The *Leave Administration* student guide provides a copy of the PowerPoint slides used during the classroom training. You will observe that space is provided for you to write notes. You can use the guide as a reference when you return to the workplace. For example you can used the exercises for practicing in the SAP Training Environment.

Reference Materials

- Student Guide

- Exercise Guide

- Job Aids

- Other resources:

    – Online Help

    – Simulations

    – Work Instructions

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Notes

Simulations let you practice using SAP in a clearly defined and safe environment. Each simulation has instructions to guide you through the task. Simulations are available only for select transactions.

BEACON Online help

- Provides step-by-step procedures by screen
- Includes links to complete step-by-step procedures that you can print
- Includes links to simulations

To access BEACON Help from any SAP screen, select the **Help > BEACON Help menu option**

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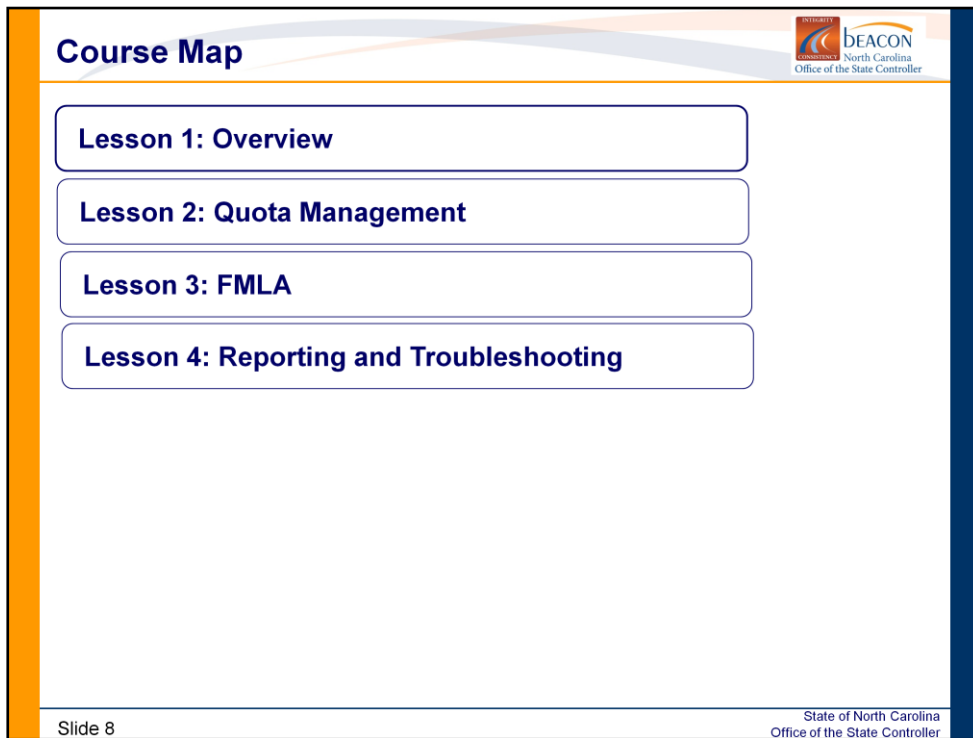State of North Carolina
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Notes

To access BEACON on line help:

- http://help.mybeacon.nc.gov/beaconhelp/

Course Map

Lesson 1: Overview

Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting

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Notes

This course is designed to provide you with knowledge and skills necessary to perform Leave Administration in SAP.

Course Objectives

Upon completion of this course, you should be able to:

- Explain how information in other BEACON modules may affect time, payroll, and quotas.
- Describe the Quotas available to employees.
- Describe and execute the process for quota corrections.
- Describe and execute the maintenance of FMLA-relevant absences.
- Perform basic quota reporting and troubleshooting.

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Notes

TM310 – Leave Administration

Course Map

Lesson 1: Overview

Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting

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Lesson Objectives - Overview

Upon completion of this lesson, you should be able to:

- Explain how information in other BEACON modules may affect time, payroll, and quotas
- List leave quotas in BEACON
- List key changes:
  - Leave Hierarchy
  - Leave Offsetting
  - Holiday Behavior
  - Time Evaluation

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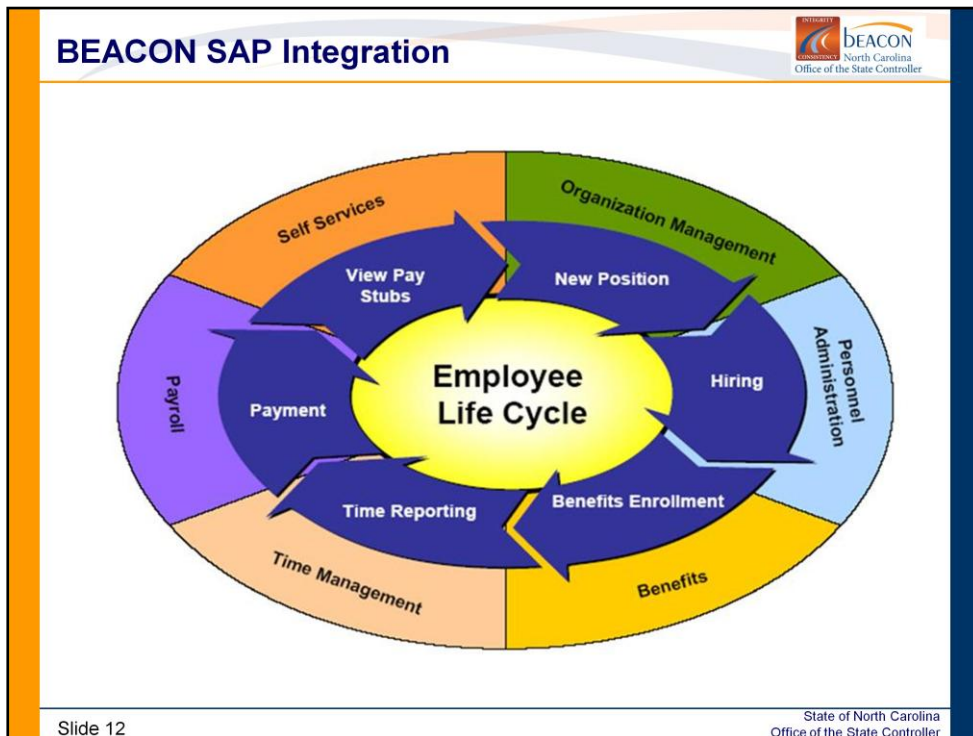
Notes

Notes

Because BEACON is an integrated system, entries made in one module affect other system components, such as an employee's time and pay.

Some infotypes entered are tied directly to the employee, like work weeks, schedules, addresses, and tax withholding information. Other infotypes are applied to the position and affect things like how BEACON looks at holidays, overtime, and premium pay. OM, PA, BN, and TM settings all can affect an employee's paycheck.

PA Infotypes and Time, Benefits, Payroll

- IT0000 – Actions
- IT0001 – Organizational Assignment
- IT0002 – Personal Data
- IT0006 – Address (permanent)
- IT0007 – Planned Working time
- IT0008 – Basic Pay
- IT0041 – Date Specifications
- IT0552 – Time Specification/Employ. Period
- IT2003 – Substitution
- IT2001 – Absences

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Notes

To understand some of the interconnection between BEACON modules, we need to look at how some of the infotypes from one area may affect processing in another. For example, the infotypes listed above are entered in PA, but affect an employee's time, benefits and payroll.

The next few slides give some details on some of these interconnections.

PA Infotypes and Time, Benefits, Payroll

Display Actions (0000)

Pers.No. 80000327
Name Kumar Reinaldo02
EEGroup A SPA Employees PersA 4601 Cultural Resources
EESubgroup A1 FT N-FLSAOT Perm
Start 05/05/2008 to 12/31/9999 Chng 08/18/2008 ZWFINOMPA191

Personnel action
Action Type Leave of Absence (NC)
Reason for Action 10 Reserve Active Duty (Leave

Status
Customer-specific
Employment Active
Special payment Standard wage type

Display Organizational Assignment (0001)

Personnel No 80000327 Name Kumar Reinaldo02
EEGroup A SPA Employees PersA 4601 Cultural Resources
EESubgroup A1 FT N-FLSAOT Perm Statu Active
Start 05/05/2008 to 12/31/9999 Chng 08/18/2008 ZWFINOMPA191

Enterprise structure
CoCode NC01 STATE OF NC
Pers.area 4601 Cultural Resources Subarea NC01 7day Norm
Cost Ctr 4699999999 CULTURE RESOUR Bus. Area 4600 Cultural Resources
Fund 469999999 CULTURE- SUSPE

Func. Area 6000000000000001

Personnel structure
EE group A SPA Employees Payr.area 01 NC Monthly
EE subgroup A1 FT N-FLSAOT Perm Contract

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Notes

Time, Payroll and Benefits use information from IT0000 and IT0001.

- **Actions IT (0000)**: Employment status (Active, Inactive, Withdrawn).
- **Org Assignment IT (0001)**: Employee Group, Employee Subgroup, Personnel Area, Personnel Subarea, and Payroll area.

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Notes

Personal Data IT0002

Social Security number, date of birth and marital status

Addresses IT0006

Tax infotypes (Residence Tax, Work Tax Area, Unemployment State) are associated with IT0006 – permanent address. If IT0006 is skipped during the New Hire Action, the tax infotypes do not display, and the employee's record will error out in payroll.

If the address information is incorrect:

- a separated employee does not receive his or her final paycheck.
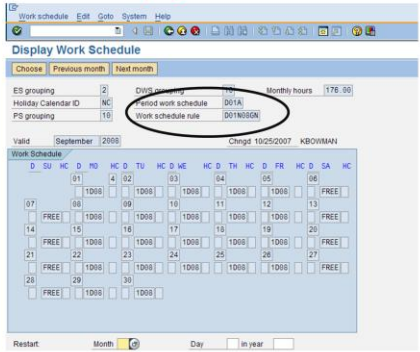- An employee may not receive W2s at the end of the year.

Planned Working Time: The Work Schedule Rule (WSR) is the foundation on which an employee's time is processed in BEACON SAP. Each employee is assigned a WSR that best represents his or her work pattern. The WSR combines an assigned holiday calendar (the main State holiday calendar or an alternate calendar approved by OSP) with a repeatable pattern of work representing an employee's scheduled work days and scheduled non-work days. The WSR can represent work patterns repeated over single or multiple weeks and may include day, evening, and night shift designations that trigger premium payments at rates designated for the employee's position (as set for the position in OM).

The WSR does not limit the number of hours an employee may record on any given day, but only allows leave to be taken on scheduled work days. Many fields trigger other time functions. For example, Time Sheet Defaults, IT0315 (from PA20) are directly related to the Time Management Status field on IT0007. A Time Mgmt Status of *1* indicates that a time sheet is required, and *9* indicates a Time Sheet is not required (positive time or negative time). If a negative time employee is on Leave of Absence, IT0007 must be revised to change the employee to positive during the Leave and changed back to negative on Reinstatement.

Negative time employees should be employees who work 5 days a week, 8 hours a day.
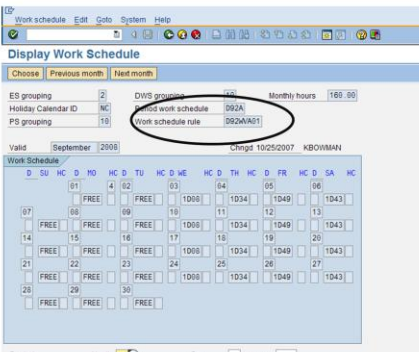
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Notes

Example of IT007 Impacts Employee's Pay

This example describes two employees hired on the same day but given two different work schedules. Both employees are paid $6,250 monthly salary.

Employee **A** starts on Sept 19 and is assigned work schedule D01N08GN which has 22 possible work days in the month. Counting Sept. 19th , the employee worked 8 days of the possible 22. The Pay is figured by this formula: 8 days divided by 22 times the monthly rate ($6,250) = $2,272.73 paid for the month for Employee A (based on IT0007 and IT0008).

Employee **B**'s work schedule (D92WVA01) has 16 possible work days in the month. Counting the first day Employee B reported to work (9/19), the employee worked 6 out of the 16 days. The number of days worked (6) divided by the possible work days (16) times the monthly salary ($6,250) calculates a pay of $2,343.75.

You can see that both employees were paid correctly, yet the specific work schedule, and Basic Pay (IT0008), determined two different pay amounts. This shows how schedules entered in PA can affect employee pay. Note that, unless the employee has a significant number of days without pay (A/A Type 9400), this discrepancy would only affect the first and last months that an employee is on a certain schedule.

PA Infotypes and Time, Benefits, Payroll

Display Basic Pay (0008)

Salary amount | Payments and deductions

Personnel No	80000327	Name	Kumar Reinaldo02	
EEGroup	A	SPA Employees	PersA	4601 Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active
Start	01/01/2008 to	12/31/9999	Chng	06/09/2008 ECATT

Subtype 0 Basic contract

Salary

•Reason field must be entered

			Capacity Util. Level	100.00
Reason	Z0	New Hire		
PS type	01	Graded	Work hours/period	173.33 Monthly
PS Area	01	Annual Salaries	Next increase	
PS group	6R68 Level 6R		Annual salary	35,500.00 USD

•Other fields default from position

Wa	Wage Type Long Text	O	Amount	Curr	I	A	Number/Unit	Unit	
1000	Regular Salary		2,958.33	USD		✓	0.00		

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Notes

Basic Pay: Salary or hourly wages

The **Salary Amount** button does not calculate correctly for DOT employees, but does calculate for all non-DOT wage types. You must manually enter information in the Reason field during the Action. The remaining IT0008 fields default from the PCR for a salaried employee. In the case of an hourly employee, you must enter the hourly wage in the Amount field.

You would seldom make an entry directly on IT0008. Most of the adjustments involving an employee's pay would result from an Action. However, one example of when it is appropriate to make a direct adjustment to IT0008 is when an employee returns to work part-time while receiving partial Worker's Comp.

Date Specifications IT0041

Time Evaluation bases leave accruals and longevity payments on dates contained on IT0041 so they must be an accurate reflection of the employee's State career. Supplemental Staff employees will not have an IT0041. Initially the Original Hire Date and Agency Hire date are the same. If an employee has a Reinstatement Action (either the employee was on Leave of Absence (LOA) and returned, or left State employment and returned), or Transfer Action, the Agency Hire date will automatically reflect the date of the Reinstatement or Transfer Action.

Time Specification/Employ. Period IT0552

Creditable service earned prior to BEACON must be entered on IT0552. Once an employee is entered into BEACON, the system automatically calculates service and longevity dates using the Time module. If HR makes changes to IT0552 that affect the longevity date, BEACON will take back any money already paid out and repay based on the new longevity date. If you make a change on IT0552, you must email BEST with the name of the employee. Do not adjust the original IT0552 entry from conversion. If an employee has creditable service from more than one organization, enter additional IT0552s to add the additional organizations, rather than extending the date on the original IT0552 to include the additional service dates.

Notes

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Notes

The Substitutions infotype is used to indicate that the employee is working something other than his or her regular schedule or is on a Leave of Absence. Substitutions may be daily or for weeks at a time. IT0007 – Planed Working Time is <u>overwritten</u> with the properties of the Substituted schedule. Some examples include:

- An employee is working at a time other than his or her planned work schedule. For example: employee works on day off, or works on a shift that has a different premium (or has no premium) than his or her usual shift.

- A full-time employee is returning from a Worker's Comp LOA (Reinstated Action), but is only working 4 hours a day. PA30 is used to create IT2003 Substitution with a 4-hour schedule. In this case, IT0008 must also be adjusted.

- An employee is on Leave of Absence (LOA). IT2003 is entered as part of the LOA Action (see next page).

IT2003 Substitutions for LOA (cont.)

Create Substitutions (2003)

Personnel No: 80000327   Name: Kumar Reinaldo02
EE group: A SPA Employees   Personnel ar: 4601   Cultural Resources
WS rule: D01N086N MTWHF-8,SaS-O   Status: Active
From: 08/18/2008   To: 08/18/2008

Subst. type: 02   Shift substitution

Daily work schedule
Daily work schedule

Work schedule rule
Work schedule rule   ES grouping
Holiday Calendar ID   PS grouping

Substitution Type (1) 11 Entries found
Restrictions
PS Grouping: 10

Type	Text
01	Employee Substitution
02	Shift substitution
05	LOA Generic
06	STD (1st 6 mths prior 89)
07	STD (2nd 6 mths prior 89)
08	STD (1st 6 mths after 89)
09	STD (2nd 6 mths after 89)
10	LOA - FMLA
11	LOA - WC Regular
12	LOA - WC Salary Cont
13	LOA - Military

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Notes

Leave of Absence (LOA) is covered in *PA410 Advanced Create and Maintain Employee Data*, but you should be aware of how the LOA Action affects an employee's time.

Every employee on LOA <u>must</u> be placed on a substitution work schedule. Like other time infotypes, IT2003 - Substitution displays as part of the LOA Action.

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Notes

The Absences infotype (IT2001) indicates the number of hours the employee wants to exhaust for leave while on Leave of Absence or the number of hours the employee is taking unpaid leave. When the dates are entered, the hours that default are based on the work schedule rule entered on the Substitution infotype (IT2003) which was created as part of the LOA Action.
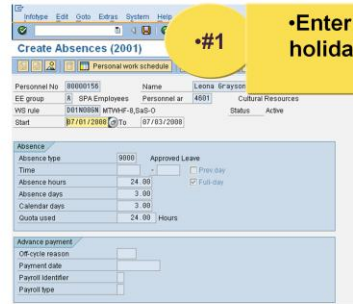
Because BEACON is integrated, the hours entered on the Create Absences infotype are fed directly to payroll. A time sheet does not have to be entered.

As long as the employee is receiving pay (leave or work), benefits continue to be deducted. If not receiving pay, the employee must pay for benefits or discontinue them.
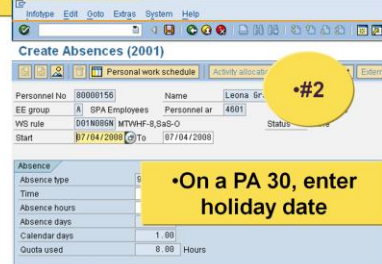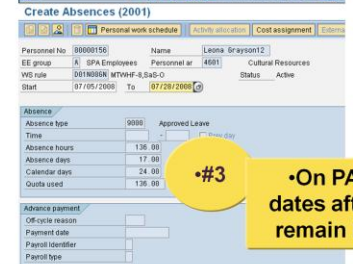
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Notes

If the employee is exhausting leave during a time that includes a holiday, additional IT2001 infotypes will be necessary to allow the employee to take holiday leave. For example, assume an employee is going out on military leave on July 1 and wants to exhaust 160 hours vacation prior to beginning the military 30 days. In this scenario, there is one holiday period (7/4). Your entries would be as follows:

1. During the LOA Action, on the Absences (IT2001) infotype subtype 9000, you will enter the dates for the leave to be exhausted **up to** the holiday period in the Start and To fields:

    Start: 7/1/2008   To: 7/3/2008 (24 hours **leave**)

2. Create a PA30 to enter the first holiday period, infotype 2001, subtype 9300:

    Start: 7/4/2008   To: 7/4/2008 (8 hours **holiday**)

3. Create a PA30 to enter the remaining leave, infotype 2001, subtype 9000:

    Start: 7/5/2008   To: 7/28/2008 (136 hours **leave**)

Position Infotypes - Employees and Time

Position flags set on specific infotypes also affect employee time and pay:

- Overtime Compensation – IT9005
- Holiday Payout Period – IT9006
- Night Shift Premium – IT9007
- Evening Shift Premium – IT9008
- Weekend Shift Premium – IT9009
- Holiday Premium Rate – IT9010
- On-Call – IT9011
- Callback – IT9012

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Notes

HR personnel with access to PO13 will update the above infotypes for a position. If the position infotypes for the types of pay are not flagged correctly, even if hours are entered, released, and approved, the employee will not receive the correct pay.

If you **revise** a **position** setting that is **retro** to a pay period before the current pay period, you **must contact BEST Payroll** to let them know to run time evaluation on the affected employees retro to that same time period. You only need to contact BEST Payroll if you revise a position. If you revise time for an employee, BEACON automatically runs time eval and adjusts the time records.

NOTE: If a position is revised, an email should be sent to BEST Shared Services. In the subject line, type "Retro Time Evaluation."

In Organizational Management, the infotype codes do not display like they do in PA. To see the infotype number in PO13, select the infotype, and then click the "Activate infotype" button at the top of the screen. The infotype number will display in the message at the bottom of the screen.

Activate Infotype button:

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Notes

Overtime Compensation (IT9005)

If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record. If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked. The default is 365 days. The setting on IT9005 works with IT2012 (discussed later) determine the rules for overtime compensation.

As indicated previously, an employee may have worked more than 40 hours and entered and released the time. Even if the time is approved by the manager, if the Overtime Compensation infotype is not flagged correctly for the position, the employee will not receive overtime compensation. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.

Holiday Payout Period (IT9006)

If holiday compensatory time (equal time off for time worked on a holiday) is to be paid out at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked.

The default is 365 days. If no record exists, the default value of 365 applies.

Notes

Positions eligible for any of the premiums listed below must have valid infotypes.

Night Shift Premium (IT9007)

OSP approved rates other than the default of 10% must be entered in the Rate field.

Evening Shift Premium (IT9008)

OSP approved rates other than the default of 10% must be entered in the Rate field.

Weekend Shift Premium (IT9009)

OSP approved rates other than the default of 10% must be entered in the Rate field.

The various types of premium pay display as separate line items on the employee's pay stub only if the rates are different. For example, if an employee's evening and night shift are both 10%, the hours worked in the evening and night are together on one *Shift Premium* line item on the pay stub. On the other hand, if the evening rate is 10% and the night is 15%, two separate line items will show with the hours entered for the evening separate from the hours entered for night.

Notes

Holiday Premium Rate (IT9010)

IT9010 is only required if the Holiday Premium Rate is different than 50%.

OSP approved rates other than the default of 50% must be entered in the Rate field.

On-Call (IT9011)

Positions eligible for On-Call compensation must have a valid IT9011 record.

The accrued box should be checked if the time is to be collected as On-Call comp time. The Rate field must be populated with the OSP approved on-call rate.

Notes

Call Back

Create Callback

Position	800904000836	Museum Specialist
Planning Status	Active	
Validity	08/18/2008 to	12/31/9999 Display change infor

Callback   01 S 65001751 1

Callback Eligibility ☑   Callback Accrual ☐

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Notes

Callback (IT9012)

Positions eligible for Callback compensation must have a valid IT9012 record. The decision to pay versus comp time is determined by the Callback Accrual checkbox.

Notes

The Time Transfer Specifications infotype (IT2012) can be used to influence time management behavior and is typically applied to an employee by the Time Administrator. Infotype 2012 records are created for specific employees for specific periods of time. The HR Master Data Maintainer should understand the following subtypes for the time infotype 2012:

Z004 - Set Actual Pay Behavior

Applicable for positive time/exception pay employees. This subtype record will cause the generation of leave without pay wage types to fill the difference between reported hours and planned hours. This causes the employee to be treated as a positive time/actual pay employee.

Z005 - PERT Eligibility and Rate

Applicable for DOC employees eligible for PERT (Prison Emergency Response Team) premiums

Z006 - Holiday Ineligibility

This subtype record will cause the suppression of Holiday Premium Pay during the validity period specified.

Z007 - Baylor Plan – Reg (Beg)
ZZ07 - Baylor Plan – Reg (End)
Applicable RNs working under a regular Baylor Plan contract

Z018 - Baylor Plan + Bonus (Beg)
ZZ18 - Baylor Plan + Bonus (End)
Applicable RNs working under a Baylor Contract with a bonus at the completion of the contract

Z008 - Incentive Pay – RN (Beg)
ZZ08 - Incentive Pay – RN (End)
Applicable RNs working under an Incentive Pay contract

Z019 - Incentive Pay – LPN (Beg)
ZZ19 - Incentive Pay – LPN (End)
Applicable LPNs working under an Incentive Pay contract

Z009 - First 10 hrs Comp
Applicable for subject employees who have a position with a Overtime Eligibility (IT9005) record that does not indicate "pay immediately". This subtype record will cause the additional hours worked beyond 50 in a week to be paid immediately. The first 10 hours of additional time worked will be compensated with Compensatory Time at the appropriate rate.

Knowledge Check

- Identify how information in time or scheduling infotypes can affect employee pay
- Describe how a work schedule assignment affects an employee's pay
- View time settings for a position
- Explain when to notify payroll regarding changes in settings

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Notes

Terms and Concepts

- Quota
- Quota Type
- Cross Application Time Sheet (CATS)
- Attendance/Absence Type (A/A Type)
- Positive Time or Negative Time
- Time Evaluation

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Notes

Quota – A balance reflecting an employees entitlement for Leave.

Quota Type – 2 digit code in SAP that indicates the type of quota. e.g.., sick (15), holiday comp time (22).

Cross Application Time Sheet (CATS) – Acronym in SAP for the time sheet used by Time Administrators to enter or correct time

Attendance/Absence Type (A/A Type) – A code that reflects the nature of an employee's absence or attendance. Absence codes are for time off – sick, vacation, bonus, etc. Attendance codes reflect time worked - regular work, hours, make up time, etc.

Positive Time or Negative Time – Describes the requirement to enter all time worked and leave taken (Positive time), or to record exceptions from their normal work schedule only (Negative time)

Time Evaluation – The Nightly Time Evaluation run processes time rules and readies approved time for use for Payroll processing.

Quota Types

Quota Type	Quota Text
10	Vacation Leave
15	Sick Leave
20	Overtime Comp Time
22	Holiday Comp Time
24	Travel Compensatory Time
26	On Call Comp Time
31	Advanced Vacation Leave
32	Advanced Sick Leave
40	Holiday Leave
50	Bonus Leave
61	Adv weather # hours owed
65	Community Service Leave
66	Community Service - Tutoring
80	Received Shared Leave
85	Military Leave (Training)

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Notes

Specific descriptions follow on the next pages.

Holiday Leave is the holiday that is due in the next 60 days, for positive time employees. A holiday absence will reduce the amount in the Holiday Leave Quota. Negative Time employees will not see an increase in their Holiday Quota in advance of a holiday.

Holiday Comp is earned when an employee works on a holiday or if the employee does not use the holiday leave within 30 days of the holiday. At that time, the system automatically moves the Holiday Leave to Holiday Comp Leave.

Leave Hierarchy – Approved Leave

A/A Type 9000

1. Holiday Comp   2. OT Comp   3. On-Call Comp   4. Travel Comp

5. Vacation   6. Bonus Leave   7. Advanced Leave

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Notes

All absences recorded as **'9000 - Approved Leave'** will be subject to this **Leave Hierarchy**. The Leave Hierarchy reflects the order in which leave balances will be deducted when an entry for an Approved Absence is approved and transferred at night. At the point of entry, the quotas are checked in succession until enough quota is found to cover the recorded absence. The system will only return a message 'no quota available' if it has checked each bucket and not found a balance to cover the absence.

The quotas will be automatically deducted in this order.

1) Holiday Comp
2) OT Comp
3) On-Call Comp
4) Travel Time Comp
5) Vacation
6) Bonus
7) Advanced Leave

For more information about OSP Leave policies, please refer to the OSP website:

http://www.osp.state.nc.us/manuals/manualindex.htm

Hierarchy – Sick Leave

A/A Type 9200

1. Sick Leave

2. Voluntary Shared Leave

3. Advanced Sick Leave

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Notes

The **Sick Leave Hierarchy** represents the order in which the system will deduct quotas when an entry of 9200 is recorded. Like the Approved Leave Hierarchy, the quotas are checked at the point of entry, and the quotas are deducted when time is approved and transferred.

It is important to recognize the distinction between actual and exception pay.

Actual pay – Employee only receives pay for time reported. If no time is reported then no pay is received. Temporaries and NCDOT employees are actual pay.

Exception pay – Employee receives full pay unless Leave Without Pay are reported.

Positive time reporting – Always applies to all employees subject to Fair Labor Standards Act (FLSA).

Negative time reporting – Can only apply to employees that are exempt from FLSA. Only exemptions have to be reported.

> **NOTE:** Exempt employees can be set as Positive time reporting. This may be necessary to maintain a consistent agency-wide time reporting structure.

Leave Offsetting

THE RULE:
Leave is to cover the gap between hours worked and the minimum expected work hours.

- When Approved Leave is taken in the same reporting period where the employee has worked hours over their normally scheduled work hours, the amount of leave taken will be offset with the extra work hours. The leave that had been recorded will be restored to the employees quota balances for later use. Leave restoration will be *first taken, first restored*.

  Example: A Positive Time employee with a normal 5 X 8 hour work schedule works 4 ten-hour days and takes 8 hours of leave on Friday. In this scenario the 8 hours of leave will be automatically restored to the employee's Approved Leave quota balance and the employee will be paid for 40 hours.

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Notes

Entries made for Leave in excess of the minimum required work hours for the overtime period will automatically be restored to the employee's leave quota.

For more information about the OSP Leave Offsetting policy please consult the Leave policies:
http://www.osp.state.nc.us/manuals/manualindex.htm

Notes

Quotas with established limits will be offset, except for holiday, civil and other management approved leave.

Entries made for Leave in excess of the minimum required work hours will automatically be restored to the employee's leave quota balances.

Leave restoration will be *first taken, first restored*. If a weekly employee takes Approved Leave on Monday, and then a day of Sick Leave on Tuesday, and then works an extra 8 hours on Wednesday, the Approved Leave from Monday will be the first to be restored.

NOTE: Leave Offsetting is done within an Overtime (OT) period. For normal, 40-hour, subject personnel, Leave Offsetting will be done within the 7-day OT period. For 28-day employees, the entire 28-day period is subject to offsetting.
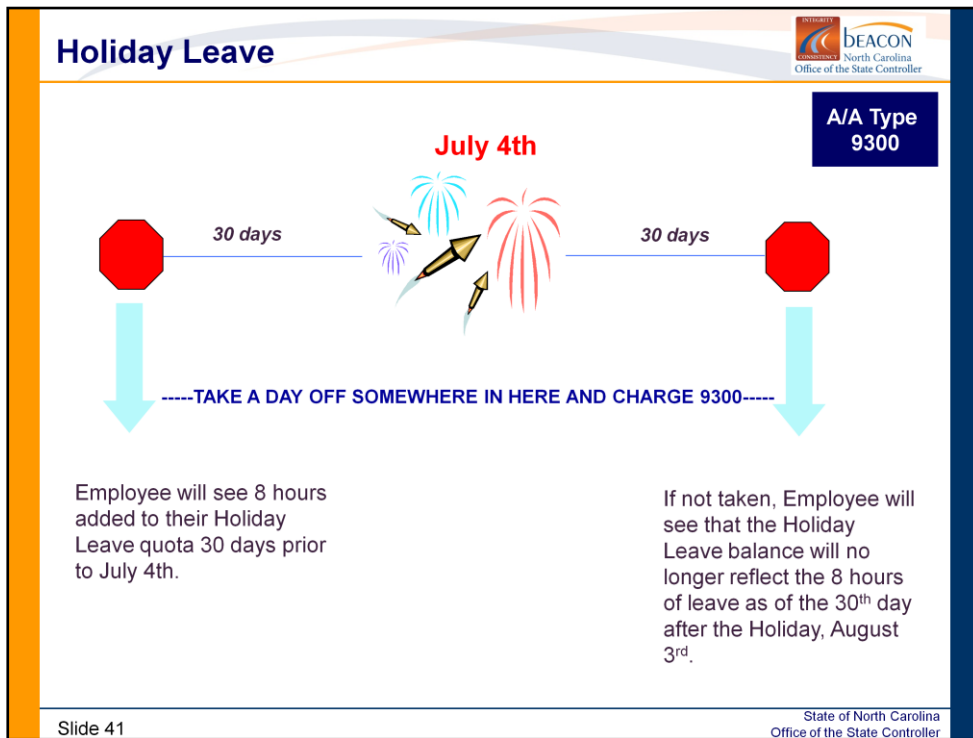
Notes

Scenarios:

For Positive Time Employees

Will see holiday leave appear in their quotas 30 days prior to the holiday

May take the holiday from that date forward, not to exceed 30 days after the holiday

May observe the holiday on the day it naturally occurs. This 60-day holiday period is designed to provide flexibility for agencies with 24x7 operations.

- If the holiday falls on a regularly scheduled work day and the employee is off, the employee should record 9300, Holiday Leave.

- If the employee works on the Holiday, the employee will record work hours, will receive equal time off, up to 8 hours, and the relevant holiday premium pay. The Holiday Leave (9300) is automatically converted to Holiday Comp Time and placed in the appropriate Leave quota by the Time Administrator.

- If the holiday falls on a non-scheduled work day, the employee may record their holiday leave (9300) on another day, an absence they should arrange with their supervisor.

Holiday Leave *(continued)*

A/A Type 9300

July 4th

30 days ——————— 30 days

-----TAKE A DAY OFF SOMEWHERE IN HERE AND CHARGE 9300-----

Employee will see 8 hours added to their Holiday Leave quota 30 days prior to July 4th.

If not taken, Employee will see that the Holiday Leave balance will no longer reflect the 8 hours of leave as of the 30th day after the Holiday, August 3rd.

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Notes

Scenarios continued:

Non-FLSA Subject employees who record exceptions only:

1. The only exception for these employees is if they WORK on the holiday. Otherwise, it will be assumed that they had the benefit of the holiday.

2. Some agencies allow the employees who normally work 4x10 to revert to a 5x8 schedule in the week of a holiday. This will not require a change to the employee's work schedule.
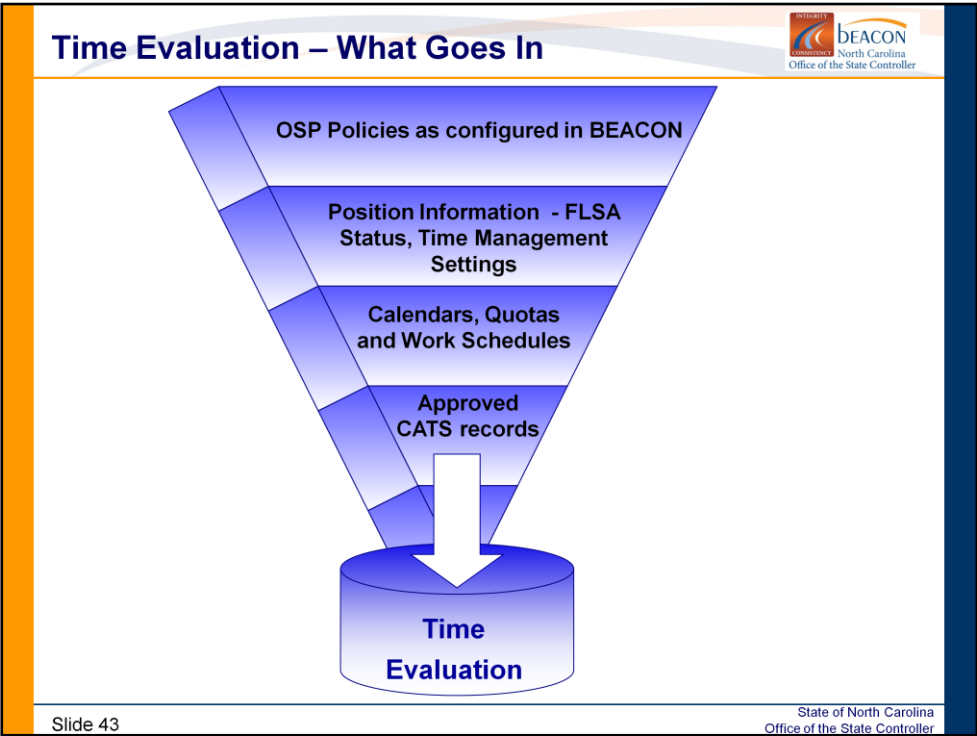
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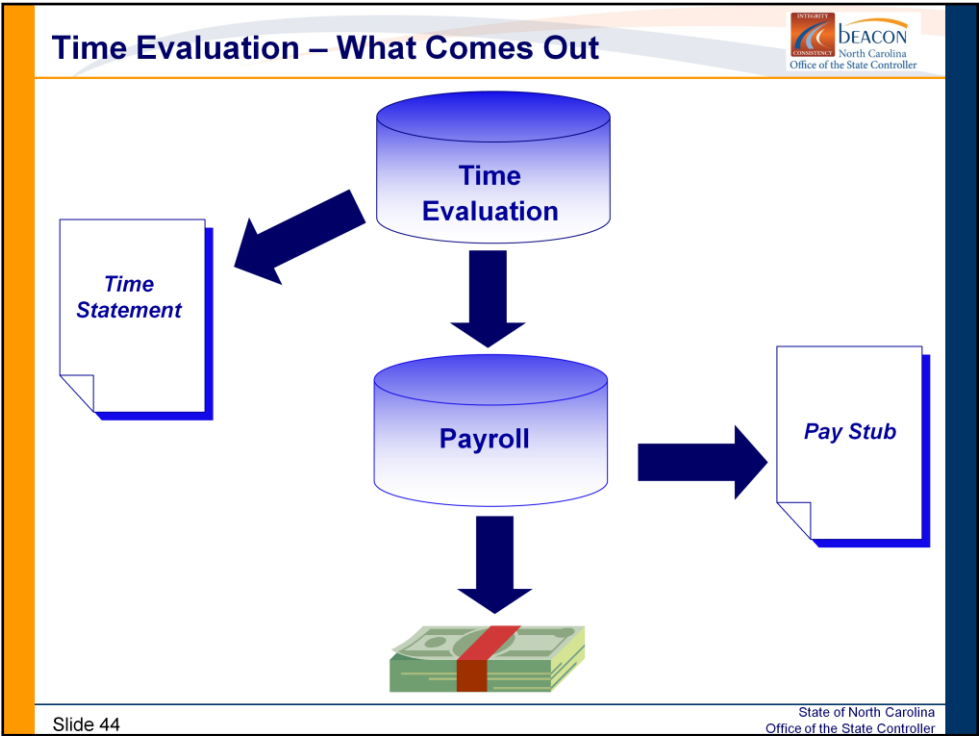
Notes

1:1 - Walkthrough

- **Log On To SAP**
  - You need to log on to the SAP training client so that you can complete course exercises.

- **Instructions**
  - Use the steps and date provided below to log on to SAP in the classroom.
    1. Access the SAP Training portal web page.
    2. Enter the User ID and password that is assigned to your classroom PC.
    3. Click the Log on button.
    4. Click Yes to confirm the security message displayed.
    5. Click on the SAP GUI tab.
    6. Click on the training client specified by your instructor.
    7. Stop when you have reached the SAP Easy Access screen.

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Notes

Knowledge Check

T	F	Question
		1. Vacation is used before Comp Time in the Leave Hierarchy
		2. SAP automatically deducts approved leave based on the new OSP leave hierarchy policy.
		3. Holiday Leave (A/A 9300) must be recorded by all employees.
		4. Positive Time employees get their holiday leave 30 days in advance.

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Notes

Lesson Review

In this lesson, you learned to:

- Explain how information in other BEACON modules may affect time, payroll, and quotas
- List leave quotas in BEACON.
- List key changes:
    - Leave Hierarchy
    - Leave Offsetting
    - Holiday Behavior
    - Time Evaluation

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Notes

Lesson Objectives

Upon completion of this lesson, you should be able to...

- View quotas. (PT50)

- Modify quota balances. (PA61)

- Describe Community Service Leave in BEACON.

- Convert quota from CSL to CSL-Tutoring.

- Describe Voluntary Shared Leave process at a high level.

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Notes

Quota Accruals

- **Who accrues?**
  - Employees with a employer/employee non-temporary relationship with the State
- **When do Employees Accrue?**
  - Positive time employees must record time worked or leave for 50% of their scheduled work days in the pay period to accrue in that period. The accrual date depends on the number of work days, as derived from the employee's work schedule.
- **What counts for accrual?**
  - Any approved entry that puts the employee in a pay status for that day will count towards the 50% achievement.
- **What do they accrue?**
  - Hours and minutes, in decimals
- **What is prorated?**
  - Annual Leave and Sick Leave are prorated for part-time employees. Community Service leave is prorated for new hires starting after mid-January.

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Notes

The accrual date depends on the number of work days, as derived from the employee's work schedule.

- For example:
  - An employee works 5 days a week.
  - There are 21 work days for this employee, on this work schedule, in the current month.
  - The employee would accrue his leave when time is entered and approved through the 11th workday of the month *.

Employees with intermittent LWOP could conceivably accrue later in the month.

Any approved entry that puts the employee in a pay status for that day will count towards the 50% achievement.

NOTE: Only time entries that place the employee in a pay status are counted toward achievement of 50%. Any entry for Leave without pay (LWOP – A/A type 9400) will delay the accrual of leave until the employee meets 50% of the period in a pay status.

Accruals – When and How

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THE RULE:

An employee will accrue their leave when they have achieved 50% of their payroll period.

• Employees who are Positive Time must demonstrate that achievement by recording time.

• Employees who record only their exceptions (Negative Time) will receive their accruals based on their planned Working Time.

NOTE: BEACON recommends weekly time entry to ensure timely and accurate accruals. Agencies adopting monthly entry deadlines for their Positive Time Recording population will see a delay in the monthly accruals.

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Notes

Quotas – Recording Leave

- Employees accrue leave when the time has been earned based on approved timesheet entries. Leave may not be taken before it is earned. Time must be entered, approved and evaluated before the accrual will be done.

- Leave earned on the 15th day may not be applied to an absence on the 10th.

- Quotas cannot be negative. Employees and Time Administrators cannot record more leave than the employee has available on that date.

- Leave Administrators have the responsibility to research Quota problems and make appropriate adjustments.

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Notes

NOTE: It is within the agency's discretion to permit a Leave Administrator to adjust the validity date or deduction date. This would be unusual, but can be done. It is not standard practice.

Advanced Leave

- Agencies may elect to Advance leave in accordance with OSP Policy. Typically this is rare and for a specific purpose, not vague or casual.

- A Leave Administrator, with management approval, would create an Advanced Leave Quota for the hours awarded.

- The Advanced Leave Quota will be consumed when the employee records an absence that deducts from that Quota.

- The system will generate a Liability for the employee based on the hours taken. It will recover future accruals towards that liability until it is satisfied.

- The Advanced Leave Request form is available online.

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Notes

Advanced Leave is subject to the limits in the OSP Policy manual.

The recovery of liabilities is reflected on the Time Statement.

Advanced Leave - Recovery of Liabilities

Advanced Leave

– As leave is accrued, it will be used to satisfy an outstanding Advance Leave liability of the same type (i.e., vacation accruals will be used to pay back vacation advances).

– If an employee has an outstanding Advanced Leave liability and works hours in excess of their required minimum hours, those excess hours worked will be used to pay back the liability until it has been satisfied.

The recovery of liabilities is reflected on the Time Statement.

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Notes

Adverse Weather

• Absence due to adverse weather is entered using the Adverse Weather A/A type – 9545.

• During Time Evaluation this A/A type will cause the creation of an adverse weather liability.

• During subsequent Time Evaluation the system will check for the Adverse Weather Make-up A/A type – 9512 for regular hours worked, as well as regular hours worked in excess of the required minimum hours.

• The adverse weather liability will be reduced accordingly when either is present.

The Quota Overview (PT50) transaction has several key tabs:

- **Selection dates –** tab allows user to choose the period of time they wish to view
- **Absence quotas –** tab shows quota types and their balances (shown above)
- **Accrual information –** tabs shows accrual information
- **Attendance quota tab –** not in use

On the Absence quotas tab there are several columns showing key values:

- **Entitlement –** what is added to the quota balance through accruals, offsets, or adjustments during the display period
- **Remaining –** hours left for use by employee
- **Requested –** hours deducted

On the Accrual Information tab:

- **Generated –** calculated by the system and ready to be moved into employee's quotas during next Time Evaluation
- **Transferred –** moved into employee's quota and available for use

Notes

2:1 - Instructor Demonstration

- **Quota Overview – PT50**
  - You wish to view an employee's quota balances

- **Required data:**
  - Personnel number – See exercise guide

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Notes

2:2 - Walkthrough

- **Quota Overview – PT50**
  - You wish to check an employee's accrual rate for Vacation Leave

- **Required data:**
  - Personnel number – See exercise guide

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Notes

Work Instruction: Quota Overview – PT50

Quota Adjustments

- Quota adjustments can be used to:
  - Correct quota errors
  - Advance leave
  - Convert Community Service Leave to community service leave tutoring
  - Administer Voluntary Shared Leave*

- Quota adjustments are done by selecting the Quota subtype and then entering the number of hours.

- Transaction – Maintain Time Data - PA61
  - Infotype 2013
    - » Subtype 10 – Vacation
    - » Subtype 15 – Sick Leave
    - » Subtype 31 – Advanced Vacation
    - » Subtype 32 – Advanced Sick

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Notes

The list above is a partial list of Quotas. A complete list may be viewed in SAP.

* The *TM340 - Voluntary Shared Leave* Web-based training course is available. Contact your Agency Training Agent to enroll you in this course.

Leave Administrators have the following options to choose that are *allowed* by the system:

- Increase
- Reduce
- Replace (do not use!)

The Leave Admin must also choose a transfer option – **ALWAYS choose "Only transfer quota correction immediately**." Transfer Immediately means that it will transfer with the next run of Time Evaluation.

Quota balance will reflect the change once Time Evaluation has been run at night.

Holiday Quota Corrections

- If a <u>Positive Time</u> employee fails to record 9300-Holiday Leave within the 60-day period AND fails to record work time on the Holiday, the Time Administrator will see a Time Evaluation error message:

  "Holiday Not Taken"

- The Time Administrator should confirm that the employee has not had the benefit of the holiday.

- If the employee has not had the benefit of the holiday, the Time Administrator will request that the Leave Administrator increase the Employee's Holiday Comp Quota for the hours not taken.

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Notes

Leave Administrators will not typically be looking at Time Evaluation Error Messages but they do have access to a transaction to do so. Leave Administrators need to access the Time Evaluation Messages Display (PT_ERL00) transaction. If a Time Administrator makes a correction in the timesheet to show the holiday as taken, it will result in a retro calculation that will eliminate the message.

The only time action that will be required by the Leave Administrator is if the employee did not have the benefit of the Holiday. The Leave Administrator must reduce the Holiday quota by 8 hours for a holiday not taken and increase the Holiday Comp Quota by the same 8 hours.

2:3 - Instructor Demonstration

- **Quota Adjustment – Vacation Leave – PA61**
  - You need to increase an employee's vacation quota by 10 hours to correct an error.

- **Required data:**
  - Personnel number – See exercise guide
  - Infotype – 2013
  - Subtype 10

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Notes

Work Instruction: Advanced Leave – PA61

NOTE: The creation of the absence quota doesn't create a liability. The absences recorded for the employee that use the Advanced Leave will create a liability from the Employee to the State.

Notes

2:5 - Exercise

- **Quota Adjustment – PA61**
  - You need to adjust an employee's sick leave balance to correct an error that occurred prior to Go Live

- **Required data:**
  - **Personnel number –** See exercise guide
  - Infotype – 2013
  - Subtype – 15

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Notes

NOTE: Normally, time balances should be adjusted through corrections to CATS entries if possible.

Work Instruction: Quota Adjustment PA61

Notes

Employees accrue 24 hours of Community Service Leave (CSL) annually. Full time employees may opt to convert their 24 hours of community service leave (CSL) to 36 hours of community service tutoring. This conversion is performed by creating a quota correction to reduce quota 65 to zero hours and another to increase quota 66 to 36 hours.

CSL must be used between January 1st and December 31st within the calendar year.

CSL should be used in one-hour increments.

2:6 - Walkthrough

- **Convert CSL to CSL Tutoring – Quota Adjustment – PA61**
  - You need to convert an employee's 24 hours of community service leave to 36 hours of community service leave – tutoring.

- **Required data:**
  - Personnel number – See exercise guide
  - Infotype – 2013
  - Subtype – CSL – 65 and CSL – Tutoring - 66

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Work instruction: Quota Adjustments– PA61

Notes

As with the other topics in this lesson, the Voluntary Shared Leave process is administered with Quota Adjustments.

* The *TM340 - Voluntary Shared Leave* Web-based training course is available. Contact your Agency Training Agent to enroll you in this course.

Voluntary Shared Leave Process

1. A Voluntary Shared Leave Event must be established:
   - Date of the event should reflect the start date of the employee's confinement or disability.
   - No system check for eligibility

2. A Donation must be processed.

3. The Recipient must be credited.

BEST Shared Services will manage donations when the Donor and Recipient are in different BEACON agencies.

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Notes

A leave administrator will process leave donations within their agency. Donations are usually Vacation Leave. If the Recipient is related to the Donor, the Donor may elect to donate Sick Leave.

For clarification on who may donate to whom and the limits on the amount of leave that may be donated, refer to the OSP Policy Manual online at the following URL:

http://www.osp.state.nc.us/manuals/dropmenu.html

Detailed work instructions are available on the BEACON Online Help site for the VSL process.

Ending of VSL Events

- Unused leave, in excess of 40 hours, must be returned to ACTIVE employees, on a pro-rated basis at the end of the Shared Leave event.

- Leave administrators may manage the return of leave to Donors if all Donors are in the Recipient's agency.

- If leave is to be restored to people outside the agency, then the Leave Administrator must contact BEST Shared Services.

- The VSL Event must be ended by changing the To date filed in the VSL event.

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Notes

See the State's VSL policy.

Knowledge Check

T	F	Question
		1. Employees accrue on the 1st of the month.
		2. Advanced Leave requires management approval.
		3. Recovery of liabilities is automatic.
		4. Subtype 10 is Sick Leave.
		5. Quota Adjustments are done through PA61.
		6. Employees must formally elect the tutoring option.

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Notes

Lesson Review

In this lesson, you learned to:

- View quotas.

- Manage quota adjustments.

- Describe Community Service Leave in BEACON.

- Convert quota from CSL to CSL-Tutoring.

- Describe Voluntary Shared Leave process at a high level.

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Notes

Course Map

Lesson 1: Overview

Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting

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Notes

FMLA is the Family Medical Leave Act.

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Create FMLA Events.
- Apply absences during a FMLA Event.
- Describe the ending of a FMLA Event.

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Notes

Terms and Concepts

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FMLA event

– A qualified event under the Federal Law that guarantees an employee's job will be protected during an absence of up to 12 weeks.

FMLA absences

– An absence that falls during an employee's FMLA event period that is attributable to that event.

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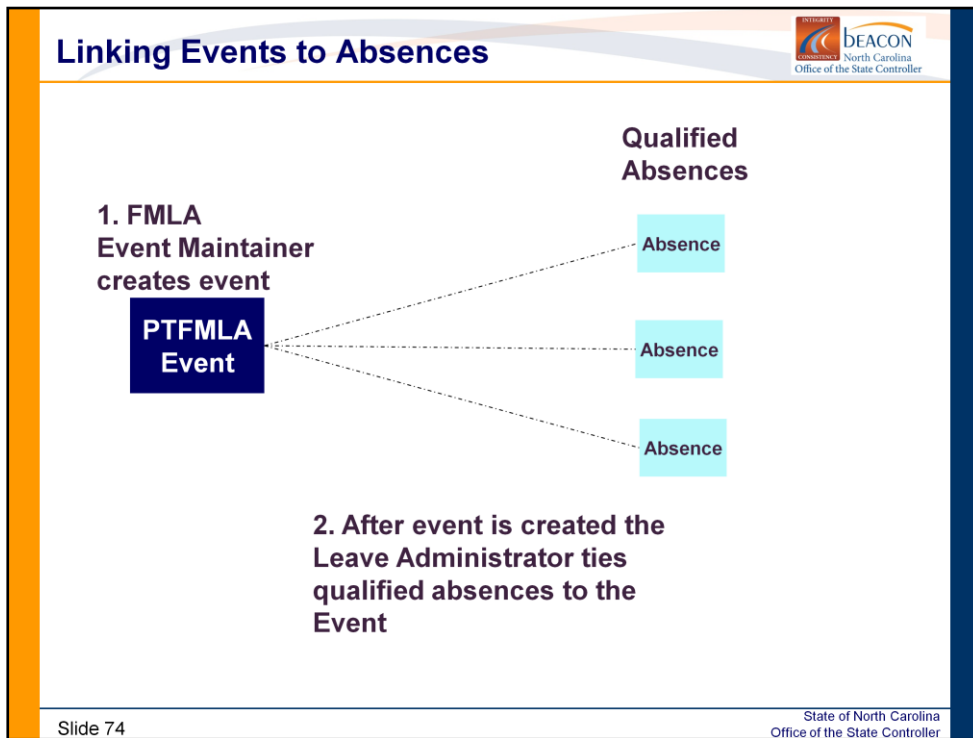
Notes

Notes

There are two FMLA profiles:

- FMLA Maintainer
- FMLA Administrator

There is a security role – FMLA Event Maintainer – that may create FMLA Events.

All Leave Administrators may apply absences, but not all may create events.

Approved Leave, Sick Leave and LWOP absences may be applied to an FMLA event.

Paid or unpaid absences may be applied. Pay status is irrelevant.

Donated Leave under Voluntary Shared Leave (VSL) does not affect FMLA. Absences are recorded as Sick Leave and applied to the FMLA event, same as other absences.

3:1 - Instructor Demonstration

- **Create FMLA Event – PTFMLA**
  - You need to create a FMLA event in SAP based on an approved FMLA request by an employee.

- **Simulation:**
  1. **Access BEACON help @**
     http://help.mybeacon.nc.gov/beaconhelp
  2. **Select Human Resources.**
  3. **Select Time.**
  4. **Select the Simulation** ~~Sim~~ **button next to Processing FMLA Event.**

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Notes

Use the PTFMLA Simulation to demonstrate the creation of a PTFMLA event.

Simulations are available for key transactions. Simulations may be used as a practice tool or as a refresher as needed.

3:2 - Walkthrough

- **Apply Absences To FMLA Event – PTFMLA**
  - You need to apply absences for an employee on FMLA to their open FMLA Event.

- **Required data:**
  - **Personnel number –** Refer to instructor data sheet

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Work instruction: Processing PTFMLA Event - PTFMLA

Notes

FMLA – Ending the Event

The FMLA event will end when either:

1. The 12 month rolling period has expired

or

2. The **FMLA Event Maintainer** changes the end date.

FMLA Event

FROM ⟶ TO

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Notes

Changing the end date held in the PTFMLA To field will end (delimit) the event.

Knowledge Check

T	F	Question
		1. All absences during an FMLA event are FMLA relevant
		2. All Leave Admins may create FMLA events.
		3. An employee may be out greater than 12 weeks
		4. Voluntary Shared Leave has no effect on FMLA.

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Notes

Lesson Review

In this lesson, you learned to:

- Create FMLA Events.
- Apply absences during a FMLA Event.
- Describe the ending of a FMLA Event.

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Notes

Course Map

Lesson 1: Overview

Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting

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Notes

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Review Time and Leave entries with transaction CATS_DA.
- Review Leave results with Time Statements.
- Troubleshoot quota concerns.

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Notes

About Troubleshooting

PRACTICE

This lesson is designed to introduce troubleshooting. After class be sure to practice and explore.

BE PATIENT

Troubleshooting is a skill that is honed over time – don't be alarmed if you don't feel like an expert at the end of class.

IT GETS EASIER

As you become more familiar with the BEACON system, data, processes, and transactions your comfort with troubleshooting will increase.

DON'T WORRY

The transactions discussed in this topic are displays and reports. They don't update or change data so running them will not "hurt" anything.

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Notes

Display Working Time – Quota Usage

Display Working Times, transaction CATS_DA, allows for the review of an employee's time records for a specified period of time.

- It reflects time as it was entered. Changes to entries are reflected as additional lines on the same date.
- It displays A/A codes, amounts, premium codes, and audit details.
- It can be subtotaled by A/A types or searched by specific A/A types.

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Notes

CATS_DA will not display changes to the data that resulted from Time Evaluation.

Time Evaluation will offset leave taken in a week where the employee has exceeded their minimum expected work hours.

Leave that has been offset will show on the employee's Time Statement.

4:1 - Walkthrough

- **Display Working Times - CATS_DA**
  - You wish to view an employee's working times in SAP.

- **Required data:**
  - Personnel number – See exercise guide

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Notes

Work instruction: Display Working Times – CATS_DA

Items to demonstrate:

1. Display data
2. Subtotal Data
3. Change columns to display
4. Filter for a single A/A type

Time Statements

	Page 1/1

Time Statement

Period: 05/01/2008 to 05/31/2008

Run Date: 01/29/2009

Personal / Organizational Data

Name		Overtime Period	Wk - Sun (mdnt) - Sat
Personnel Number		Work Schedule	D02N10_F - MTWH-10,FSaS-O
Length Of Service	221.00 Months	Emp Group	A- SPA Employees
Position	60087177 - Time Management Lead	Sub Area	NC01- 7day Norm
Personnel Area	1401-State Controller	Time Mgt Status	1 - Positive Time Recording
Org Unit Name	OSC BEACON PROD/TECH Func	Org Unit	5010030100 00

Leave Quotas (hours available)

Description	Beginning	Accrued	Deducted	Paid Out	Expired	Offset	Adjustment	End Balance
Vacation Leave	300.68	15.17						315.85
Sick Leave	1,727.17	8.00						1,735.17
Overtime Comp Time	350.18	23.25						373.43
Holiday Comp Time	8.00							8.00
Holiday leave	8.00		8.00					0.00
Bonus Leave	200.00							200.00
Community Service	24.00							24.00

Calculated Time Results

Description	
Regular Time Hours	162.00
OT Comp Earned Hours	23.25

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The Time Statement provides a summary view of Time Evaluation results for an employee for a specified calendar month. It is not a pay slip, nor does it reflect compensation.

> **NOTE**: Please note that this period of time does not align exactly with Overtime Periods.

The Time Statement gets its data from Time Evaluation results. If Time Evaluation has not run for an employee for a particular month, the Time Statement will still generate using transaction ZNCTIME, but there will be no data to display on the form. In ESS, an employee will receive a message indicating "Time Statements not available."

If the time data for a month is incomplete or Time Evaluation has not been run for all of the month, some data is displayed, but will not be complete. The data shown on the Time Statement will update after time data changes have been processed by Time Evaluation.

Time Statements *(continued)*

- Summary of all time data entered for an employee during a specific period

- ESS time users will be able to view time statements online

- Time Administrator can print Time Statements for employees as needed

- Used to view Leave Offsetting

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Notes

Any retroactive processing of Time Evaluation could change the Time Evaluation results and therefore cause changes to the data shown on the Time Statement. It is best to run the Time Statement again whenever you want to analyze the data that it provides. This will insure that you have the most recent results available.

The Time Statement is the first place to go when an employee identifies a potential error.

Time Statement can show:
- Leave that was Accrued
- Leave that was Offset
- Liabilities that were recovered
- Donations that were applied
- Position Settings

Time statements may be printed individually or via a batch process by the Time Administrator.

For further information and field descriptions, you can access the *Time Statement* job aid in the Time folder on BEACON Help.

Troubleshooting Quota Concerns

Transaction Code	Description	Usage
CATS_DA	Display Working Times	To review employee's recorded working times and leave usage (minus offsets)
ZNCTIME	Time Statement	To review final period leave usage, leave liabilities, and leave offsets
PA51	Display Time Data	Used to review service dates and other key time infotypes
PT50	Quota Overview	Check balances and accrual details

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Notes

The SAP transactions listed in the chart above are useful for troubleshooting quota concerns.

4:2 - Instructor Demonstration

- **Troubleshooting Improper Leave Deduction** – **CATS_DA & ZNCTIME**

- **Scenario**
  - Employee says his leave was improperly deducted.

- **Troubleshooting steps:**
  1. CATS_DA → Display the relevant period for the employee.
  2. ZNCTIME → Open a new session to display the Time Statement for the relevant period.

- **Things to look for:**
  - Look for leave recorded in CATS and corresponding Leave activity on the time statement.

- **Most likely causes:**
  - Keying error on initial entry or leave offset

- **FIX:**
  - Correct initial entry errors, re-run time evaluation (or wait 1 day)

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Work instructions: Display Working Times – CATS_DA
and Time Statement – ZNCTIME

Notes

Work instructions: Quota Overview – PT50 and Display Time Data – PA61

Errors in Service Dates should be referred to the HR Master Data Maintainer for research or correction.

Notes

Knowledge Check

T	F	Question
		1. Employees will be paid for everything recorded in CATS.
		2. CATS_DA is capable of showing a list of employees.
		3. Time Statements are always available.
		4. Leave that has been offset will show in CATS_DA.
		5. Time Statements display compensation.

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Notes

Lesson Review

In this lesson, you learned to:

- Review Time and Leave entries with transaction CATS_DA.
- Review Leave results with Time Statements.
- Troubleshoot quota concerns.

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Notes

Course Review

In this course, you learned to:

- Describe the Quotas available to employees.

- Describe and execute the process for quota corrections.

- Describe and execute the maintenance of FMLA-relevant absences.

- Perform basic quota reporting and troubleshooting.

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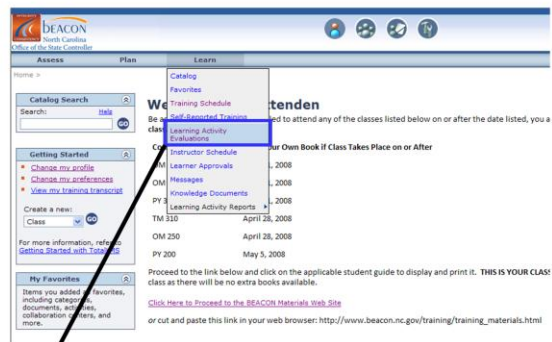State of North Carolina
Office of the State Controller

Notes

Notes

Level 1 Evaluations

The Level 1 evaluation classes is accessed as shown above (**Learner Home Page > Learn > Learning Activity Evaluations**).

Ask your instructor if you have any difficulty accessing the course evaluation.

Next Steps

Monitor BEACON communication

– BEST Shared Services web site (especially the Updates tab)
  • URL: http://www.ncosc.net/BEST/index.html
– BEACON Training website: **What's New link**
  • URL: http://www.osc.nc.gov/beacon/training/whats_new.html

Review conceptual materials

Access BEACON Help

– Access from an SAP transaction
  • URL: http://help.mybeacon.nc.gov/beaconhelp

Practice what you've learned

  • URL: https://mybeacon.nc.gov
– Client 899
– Use your current NCID user name and password

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Notes

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance after go live?

- Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.

Notes